

Company Preferences - Purchasing

Last Modified on 07/28/2025 5:56 pm EDT

Purchasing

Under the Purchasing company preference, you will be able to manage your promised dates, purchasing from preferred vendors and drop ship Purchase Orders.

Select the appropriate selection for your Purchasing preference:

- Enable multiple promise dates.
 - Limit items for purchasing to items that have the current vendor listed as a preferred vendor.
 - Include unapproved purchase orders in an item's summary.
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- After creating a Receiver for a drop ship PO, create a corresponding Ship Doc.
 - After setting a Receiver for a drop ship PO to Received Status, create a corresponding Ship Doc.

After creating a Receiver for a linked PO, create the corresponding Ship Doc OR allocate to the

- corresponding Work Order or Repair Order.
- After creating a Receiver for a linked PO, allocate to the corresponding Sales Order, Work Order or Repair Order.
- After changing the status of a Receiver to Received for a linked PO, allocate to the corresponding Sales Order, Work Order or Repair Order.
- When creating a ship doc or allocating a linked sales order, only do so if the Promise Date is less than or equal than today's date.

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- When creating a linked PO from a Sales Order, copy the Items description
 - By default use the vendor's primary contact for new purchase orders
 - Copy vendor notes to memo
 - When doing a linked PO or Linked WO, do not update the target doc's Cost field.
 - Change status to Sent after sending an email.

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- Default Location . The default location for all purchase orders. (Dropdown)

Reorder Analysis

- Include non-default vendors in Reorder Analysis when Vendor is not a filter

- When the Evaluation Quantity is Below Reorder Point Plus Deficiency, also deduct Required
- Wne using a single location filter, always show reorderpoint, reorderamount and max quantity for that location

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Click **Save** when done.

Adding Multiple Promise Dates

- After the PO has been created, initiate the initial promise date on the PO creation page.

The screenshot shows the 'Purchase Order' creation interface in the OrderTime system. The 'Promise Date' field is highlighted with a red box and contains the date 02/08/2024. The page includes a sidebar with 'Recent Records' and a top navigation bar with tabs like Home, Sales, Purchasing, Production, Repairs, Warehouse, and Reports.

- To add extra promise dates, navigate to the line item editing page.
- Click the "Edit Line Item" button.

The screenshot shows the 'Purchase Order - 18' line item editing page in the OrderTime system. The 'Edit Line Item' button is highlighted with a red box. The page shows details for the purchase order, including vendor information, ship address, and a table of items with columns for ITEM, DESCRIPTION, QUANTITY, UOM, COST, EXT., and ACTIONS.

- Move to the Promise Dates tab.
- Click "Add" to insert additional promise dates.

OrderTime

Search

Compu-CenterLogout

HomeSalesPurchasingProductionRepairsWarehouseReports

Purchasing > Purchase Orders > Purchase Order Line

SaveReset

Create NewOpen Full List

Recent Records

18Uline1716348Stanton DahlCHICKSOUPBATCH24

Purchase Order Line for Purchase Order 18

Item S-21025Line No. 1

GeneralCustomPromise Dates

Add

PROMISE DATE	QUANTITY	FILLED	OPEN QUANTITY	ACTIONS
2/17/2024	4	0	4.00	<div><div></div></div>

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Assign the amounts to the respective dates if need be thought clicking the editing button to the of the .

- Confirm the changes, and you should be all set.

OrderTime

Search

Compu-CenterLogout

HomeSalesPurchasingProductionRepairsWarehouseReports

Purchasing > Purchase Orders > Purchase Order Line

SaveReset

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Recent Records

18Uline1716348Stanton DahlCHICKSOUPBATCH24

Purchase Order Line for Purchase Order 18

Item S-21025Line No. 1

GeneralCustomPromise Dates

Add

PROMISE DATE	QUANTITY	FILLED	OPEN QUANTITY	ACTIONS
2/17/2024	4	0	4.00	<div><div></div></div>

Add/Edit Promise Date

GeneralCustom

Quantity4

Promise Date2/17/2024

Save

Close

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